

MEET JOSEF

Lawyers can create their own online bots with this platform.



PETER MORAN

Which practitioners would find this technology useful?

Any lawyers and law firms looking to create their own:

- automated agreement, letter and form processes, both internally and for clients
- online client intake and triage processes; and
- automated legal guidance/advice processes, both internally and for clients.

How does it work?

Josef provides a platform for lawyers to create their own online bots. A bot is a form of artificial intelligence whereby the online system interacts with a user by asking questions and, depending on the answers provided, takes the user through an online process. That online process could be via a website or on a mobile phone or other device and could take many forms. For example, the bot could provide an automated contract drafting process whereby the key elements of a template document, such as a non-disclosure agreement, can be added to the template agreement based on the responses provided and the agreement automatically drafted for the client. Another example might be a questionnaire for a conveyancing client whereby the law firm can gather all the essential information required to start the file.

A decision tree can be built up by the lawyer which might follow one simple chronology but it also might branch depending upon variable answers. In the case of a contract, this could mean that, in addition to inserting common elements such as counterparties and the commencement date, variable “if/then” type elements can be included depending on the answer provided. The process of building bots is designed to be straightforward and intuitive. A text based menu system can be used and is not dissimilar to the process of constructing a contract from scratch. Or, for more visual lawyers, a click and drag workflow type format can be used.

Information buttons can be added to each question, allowing the user to seek further guidance should they not understand the question or how to answer it. The system is designed to be user friendly and quick, with

questions aiming to be conversational and appearing almost immediately after the answer is given.

At the end of the process, clients might be able to upload a pdf of the agreement or the law firm might be emailed a report summarising the client’s answers.

Benefits

The significant benefit of Josef, when compared with other chat-bot type systems currently available, is that lawyers have the ability to build their own bots and workflows in their own way and on their own time. Rather than relying on someone else’s intellectual property to generate work via a chat-bot system, lawyers and law firms can generate their own.

Risks

Cyber risk, as with any cloud offering, is present as regards confidential and sensitive data moving beyond a firm’s internal systems. However, with encryption in both directions, the security is substantially better than when emailing the same data and a third party vendor is also liable to the law firm for the security of the data. The data is warehoused by Josef on Google’s platform in Sydney and does not leave Australia.

Josef is available as an enterprise product for large law firms but can also be acquired as an off-the-shelf offering for any size law firm with no set-up or training fee required. Charges are via an ongoing monthly licence which includes ongoing support. Pricing is not based on the number of users but different tiers are offered depending on the number of bots and level of features and support required.

Downsides

Josef is not a point solution (unlike competitors such as Automio or Settify) which means that bots need to be created before the software can be of use to a firm. A core decision that a lawyer has to make in whether to utilise a bot system like Josef is whether or not they are comfortable with automated legal processes and the provision of legal advice to a client without, potentially, having had any human contact with them. There may be risks in providing legal advice in such an automated way. Lawyers need to consider those risks and take care with how workflows are constructed so that non-standard circumstances are directed out of the bot processes and, ideally, to the bespoke advice of the lawyer. ■

Peter Moran is principal at Peer Legal and founder of the Steward Guide, an online technology guide for lawyers (www.stewardguide.com.au).

SNAPSHOT

What is Josef?

Bot creation platform

What type of technology?

Software-as-a-Service (SaaS) cloud platform

Vendor

Josef Legal Pty Ltd

Country of origin

Australia

Similar tech products

Automio – www.automio.com

Settify – www.settify.com.au

Survey Monkey – www.surveymonkey.com

Law Droid – www.lawdroid.com

Neota Logic – www.neotalogic.com

Non-tech alternatives

Lengthy telephone calls, meetings or exchanges of emails.

More information

<https://joseflegal.com/>

